Is Alignment With Enterprise Software Vendors the Next Frontier for Legal Technology?

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Professional Credentials
• He holds both a Master of Business Administration and Bachelor of Arts (Economics) from Rutgers University.

Kenneth E. Jones
Chief Technologist

Mr. Jones oversees various aspects of technology at Tanenbaum Keale LLP in his role as Chief Technologist. He leads efforts to support TK's computing environment and infrastructure, which involves a strategy of professionally protecting and processing client data in the cloud with highly skilled and respected leading–edge business partners in the technology space. Additionally, Mr. Jones helps lead and support various TK programs in the areas of security, compliance, business continuity and firm administration.

Experience

Mr. Jones also serves as Chief Operating Officer of TK–owned SaaS company Xerdict Group LLC. Xerdict Group LLC is a software company that provides a wide variety of internet–based technologies to TK clients, including case management systems, discovery applications and document repositories. At Xerdict Group LLC, he directs application development, database analysis and network operations to construct and operate powerful, customizable systems that support the litigation case management, e–discovery and related business needs of internal and external clients. As a wholly owned software company, Xerdict Group LLC is able to leverage its Oracle–based technology and source code to provide clients with exceptional systems at highly competitive costs.

Prior to his work with law firms, Mr. Jones served as a Director of Technology at Bristol–Myers Squibb Company, leading an Applications Development organization. In that capacity, he supported a wide variety of legal functions within the $20 billion company for legal departments including litigation, intellectual property, internal investigations, compensation/stock options and other legal functions.

Mr. Jones has developed innovative solutions, both in a law firm and corporate legal environment, for over 20 years.

Presentations and Publications

- Corporate Counsel – July 8, 2019 , <u>Applying Business Process Improvement Concepts to One's LinkedIn Program</u>
- Legaltech News – June 13, 2019, <u>Is Alignment With Enterprise Software Vendors the Next Frontier for Legal Technology?</u>
- Law Technology Today – May 15, 2019, <u>Digital Transformation: Key Implications for Law Firm Technoglogy Services and Offerings</u>
- Corporate Counsel – April 30, 2019, <u>Applying Technology to Legal Matters to Support the Goals of In-House Counsel</u>
- LegalTech News – March 20, 2019, <u>Knock 'Em Out: Law Firms Have Advantages to Fight Back Against the Big 4, ALSPs</u>
- Legal Executive Institute – February 14, 2019, <u>How to Use Customer Relationship Management Tools in the Legal Space.</u>
- LegalTech News – February 14, 2019, <u>Today's Law Firm Tech Training: A Multidimensional Challenge.</u>
- Above The Law – October 16, 2018. <u>How Bridging The Gap Between Legal Operations And Technology Entities Is Benefiting The Legal Industry.</u>
- Legal Executive Institute – September 26, 2018. <u>Had the Time of My Life: Data Management's Tools of the Trade.</u>
- New Jersey Law Journal – September 24, 2018. <u>Boutique Firms' Service Enhanced with Embrace of Innovative Technology.</u>
- LegalTech News – August 20, 2018. <u>Single Sign–On And Identity Providers For Law Firms— The Time Is Now.</u>
- ITLACON 2018 – August 16, 2018. Panelist, <u>Leveraging the Power of the Cloud for Innovation.</u>
- LegalTech News – July 11, 2018. <u>Soccer's Ten Second Lesson for Legal Technologists.</u>
- Legal Executive Institute – June 6, 2018. <u>New Management Challenges.</u>
- LegalTech News – May 30, 2018. <u>Platform Diving: How to Make Your Cloud Computing a Perfect 10.</u>
- Legal Executive Institute – May 25, 2018. <u>Rarified Air.</u>
- Legal Executive Institute – March 12, 2018. <u>10 Reasons Law Firms Should Consider Applications Development Capabilities.</u>
- Legal Executive Institute – December 1, 2017. <u>Slicing the Pie: Making Choices on Time and Project Management.</u>

Recognition

- Tanenbaum Keale LLP Chief Technologist Kenneth E. Jones was named to the second annual <u>Elite Boutique Trailblazers list by the National Law Journal.</u>

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Program

- **Setting the scene**

- **Where are we today with on-prem to the cloud?**

- **PaaS (Platform as a Service) - what are the implications?**

- **What business opportunities does PaaS provide?**

- **What are the key benefits of PaaS?**

- **What are some specific areas of opportunity?**

Setting The Scene

- **The business of law is evolutionary**

- **Technology is increasing at an increasing rate**

- **Culture is changing**

- **Alternative legal service providers are gaining influence**

- **Innovation and incubators are increasingly prevalent**

- **Start-ups abound**

Setting The Scene

- **What are some key drivers?**

- **Productivity is paramount**

- **Security is essential**

- **Roles are converging**

- **Competition is increasingly fierce**

- **Cross-functional skills spanning legal and technology are coveted**

What is On-Prem?

- **Running applications on site**

- **Storing data on site**

- **Traditional model**

- **Benefits: Areas such as customization and physical control**

- **Opportunities: Technology is not the core competency of law firms**

What is SaaS?

- **Software as a Service**

- **Subscribing to an application which stores data in the cloud**

- **Private cloud vs. cloud platform providers**

- **Benefits: SaaS companies are, generally speaking, technology experts**

- **Opportunities: Vendor management and oversight becomes increasingly important**

On-Prem to SaaS

- **What was once taboo is now increasingly acccepted**
- **Data still resides in both locations**
- **But this is not just about data**
- **Applications**
- **Infrastructure**
- **Vendor management**
- **Shifting responsibilities**

On-Prem to SaaS

- SaaS is increasingly accepted, if not embraced
- The cloud drives productivity and efficiency
- Properly controlled, security is actually improved
- Regulatory considerations (GDPR, availability zones, retention policies)
- Cost model variations (up-front vs. licensing)
- Barriers to entry / impact on innovation

On-Prem to SaaS – Data Storage

- **Data storage requires deep consideration**
- **Storage locations**
  - **Client requirements**
  - **Accidental deletion safeguards**
  - **Regulatory**
  - **Retrieval requirements**
- **Number of availability zones/redundancy**

On-Prem to SaaS - Scope

- **More than just data can be moved to the cloud**

- **Applications – desktop**

- **Applications – legal**

- **Applications – services**

On-Prem to SaaS

- **Infrastructure can also be placed in the cloud**
- **Servers**
- **Remote access**
- **Services**
- **Connectivity**

PaaS – Platform as a Service Introduction

- **What is Platform as a Service?**

- **What are Enterprise AppExchanges?**

- **Key Players**

- **Salesforce**

- **Oracle**

- **Amazon Web Service**

PaaS Considerations – Culture

- **Compiling a digital strategy**

- **Flexibility**

- **Understanding of marketplace**

- **Ability to recruit and manage human capital**

- **Change management**

- **How great client service is defined**

PaaS Considerations – Cost/Pricing

- **Generate licensing revenue**

- **Complimentary service**

- **Part of fixed fee arrangement**

- **Budgeted as innovation/incubator project**

- **Pricing should support goals (revenue, business development)**

PaaS Considerations – Implementation Tips

- **Engage platform specific experts**
- **Short project timelines**
- **Agile methodology / sprints**
- **Frequent checkponts**
- **Failing early is better than failing late**

PaaS – Corporate Law Opportunities

- **Client integration**

- **Deploying on a client's preferred platform**

- **Connecting employees beyond the legal department**

- **Faciliting intracompany communication**

- **Data consolidation and reporting**

PaaS – Corporate Law Opportunities

- **Injecting budgeting into matter management**

- **Benefiting from empirical case management data**

- **Building out partner communities**

- **Defining preferred/prohibited workflow**

- **Software total-cost-of-ownership**

- **Single pane of glass**

PaaS – Business Partner Opportunities

- **Connecting business partners**
  - **Corporate law departments**
  - **Law firms**
  - **Experts**
  - **Insurers**
- **Reduce business partner regulatory requirements**
- **Integrate business and legal data**
- **Minimize data exposure outside the PaaS environment**

PaaS –Integration Opportunities

- Some integration examples are...

- Visibility to sales/marketing/licensing data

- Financial data integration

- Document management and collaboration

- Connectivity between legal department and other departments (e.g. Chatter)

- Linking business partners for document creation and other common functions

PaaS – Why Enterprise Vendors?

- Allows legal to "get with a corporate technology program"
- Preferred pricing
- Pre-approved security infrastructure
- Reduce partner on-boarding compliance expenses
- Benefit from best-in-breed features and technologies
- Minimize overall number of applications/systems
- Perception

PaaS – Enterprise Vendors – Example 1

- **SalesForce**

- **Worldwide CRM (Customer Relationship Management) Leader**

- **~150,000 customers**

- **~4,000,000 users**

- **Offers well-developed AppExchange**

- **What's in it for them: Extend reach beyond CRM into Legal Cloud**

PaaS – Enterprise Vendors – Example 2

- **Oracle**
- **Worldwide database and ERP (Enterprise Resource Planning provider**
- **Offers AppExchange**
- **Worldwide footprint**
- **What's in it for them: Extend Reach Beyond Databases And Certain Areas Of Business Management Software**

PaaS – Other Options / Interopability StanDards

- **Legal Industry – fewer standards than other industries**
- **E-Billing / SALI Alliance**
- **App Exchanges**
  - **Renyon Court**
  - **Legal Application such as Clio**
- **Other major software vendors**
  - **Google**
  - **SAP**
  - **Microsoft**

PaaS – Business Opportunities

- **For corporate law - opportunities to more efficiently interact with outside law firms and business partners to strip costs out of the legal equation**

- **For law firms - opportunities to offer collaboration tools driving productivity on their client's preferred platform**

- **For enterprise software vendors - opportunities to expand their footprint from their core functionality (e.g. Salesforce – CRM) into other functional areas**

PaaS – Key Metrics

- **Over time, capturing empirical matter and cost management data has value**

- **Preferred workflows can be identified, variations from preferred processes can be highlighted and corrected as they occur**

- **Help lawyers work at their optimal pay grade**

- **High-end analytics and A.I. Tools resident in enterprise software vendors offerings can be applied to legal processes**

PaaS – Why It Offers Higher Ceilings

- **Top Tier Functionality / Feature Sets**
- **Reporting – Business Intelligence**
- **Workflow engines – governance and checkpoints**
- **Artificial intelligence - trend analysis**
- **Executive dashboards – single pane of glass**
- **Modern communication methods**

PaaS – Specific Opportunities

- **Target Vendors**
  - **Salesforce**
  - **Oracle**
  - **Amazon Web Services**
- **AppExchanges**
- **Integration with existing functionality**
- **Partnerships via innovation**

PaaS – More Opportunities

- **Legal clouds**
- **Win-win relationships with leading tech companies**
- **Public relations (conferences, publications)**
- **Law firm promotional opportunities – eye catching topics**
- **Introduction to new communities (VC, Tech)**

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PaaS – Some Specific Opportunities

- **Salesforce AppExchange**
  - **Lightning Platform**
- **Oracle AppExchange**
  - **Visual Builder**
  - **Hosted Applications**
- **Amazon Web Services**
  - **Hosted Applications**

Summing Up

- **Today, data and applications are both on-prem and in the cloud**

- **The cloud will play an increasingly important role in the future**

- **Platform as a Service – the integration of legal technology into the leading Silicon Valley companies – is an emerging opportunity**

- **All three environments will play a role in the future**